

WebProcure User Activities

Contract Management
State of Missouri



STRICTLY CONFIDENTIAL & PROPRIETARY INFORMATION 1

Perfect Commerce

09/16/2016

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1. Enter your “Username” and “Password” (the password is case sensitive).
2. Click [Login](#)

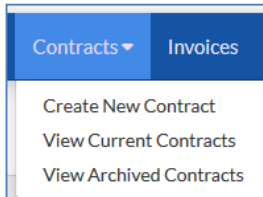
Contract Management


Activity 1 Contract Creation

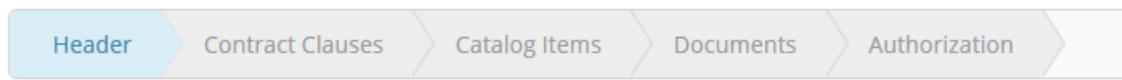
The **Contracts** module of MissouriBUYS/WebProcure provides users the ability to manage an open contract agreement with a specific supplier(s) (contractor[s]/vendor[s]) to provide goods and services as needed. Contracts may be generated through the **Contracts** module or awarded through the **Solicitation** process. The Contracts Module includes general information, commodity supplier information, commodities/items on contract, reference documents related to the contract, and suborganizations’ authorized to have their users process requests against contracts. Below are the steps for creating a contract not associated with a solicitation.

NOTE: When a contract is being created and edited, it is considered “checked out.” No other user can modify the contract if it is checked out.

1. Select Contracts Dropdown from the **Home** page



2. Click the Create option  from the dropdown
3. There are 5 possible steps as part of Contract Creation
 - 3.1. Header Information
 - 3.2. Contract Clauses
 - 3.3. Catalog Items
 - 3.4. Documents
 - 3.5. Authorization



Activity 1.1 Header Information page

Complete the following available fields:

1. **Contract Type – depending on your Organization, follow 1.1 or 1.2 below**
 - 1.1 Select the appropriate type from the dropdown for the State of Missouri (OA/Division of Purchasing).

Contract Type * <div>Contract - Commodity</div> <div>--Select One--</div> <div>Acknowledgement of Contract</div> <div>Contract - Commodity</div> <div>Contract - Services</div> <div>Contract - IT</div>	Contract Number * <div>CC17</div> Status <div>Unissued</div>
---	--

1.2 For Agencies, the options are shown below:

Contract Type * <div>Contract - Agency</div> <div>--Select One--</div> <div>ERS</div> <div>PGA</div> <div>SDA</div> <div>Contract - Agency</div> <div>Exempt Object Code</div>	Contract Number * <div>K1700004</div> Status <div>Unissued</div>
---	--

For Agencies, in addition to standard agency contracts (K), there are : ERS-Expenditure Registration System; PGA-Program Grant Authority; SDA-Special Delegation of Authority, and Exempt Object Code (X) Contract Types..

2. Contract Number

2.1. System defaulted contract number is present. The process is to default the Contract Type and FY (fiscal year) and an Org Level Auto Sequential Numbering Option to be on or off – this will be turned off for State of Missouri level and on for Agencies (sub-orgs). Note: Sequential Numbering will be restarted at the beginning of each fiscal year. **Make sure the Contract Number does not exceed 11 characters to accommodate the integration with SAM II.**

- 2.1.1. State of Missouri Level: Update the number for all types except AOC Type, with Last 4 digits of solicitation generated number and multi-award generated number (001, 002, etc.). Example: CC160369001.
- 2.1.2. State of Missouri Level: Update the number AOC Type, with the Agency Code and next assigned AOC sequential number (this number is derived from OA-Purchasing List).
- 2.1.3. Agency Level: Use the defaulted contract number – Contract Type (K (Contract – Agency), X (Exempt Object Code), ERS, SDA, or PGA), FY (fiscal year), auto generated up to 5 digits and insert your Agency Code after the Fiscal Year (suggested direction). Please see below regarding contracts related to an ERS, PGA, or SDA.

Contract Number * <div>1600010</div> Status <div>Unissued</div>

Proceed to edit and make 16###00010 where ### is your 3 digit Agency defined direction. **Example:** K1730000001.

For contracts related to an ERS, the contract number must reflect the ERS number. For contracts related to a PGA, the contract number must reflect the PGA number. For contracts related to a SDA, the contract number must reflect with the SDA number.

Example:

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SDAXXX(three digit SDA number)**XXXXX**

OR

K(indicates an agency contract)**SDAXXX**(three digit SDA number)**XXXX**

3. **Contract Visibility**

3.1. Select appropriate visibility – private or public – choose Public to display the Contract on the Contract Board

4. **Status**

4.1. No Action is required. Will default to Unissued. Will display as Issued on the date the Contract is issued/awarded to the supplier.

4.2. The Status field is system populated and displayed as read only. Contract will progress through the status options based on activity.

5. **Title**

5.1. Enter in an appropriate title for the Contract being created (limit 100 characters) (NOTE: The Title of the Solicitation will default if Contract is created from Solicitation). Vendors can search by Department, Commodity and Keyword on Contract Board. For State of Missouri level contracts, Title should contain Department name and type of item being purchased. If contract is a statewide contract, the Title should include “Statewide Contract”. **Examples:** “Child Care Resource, Referral, And Training Services for the Department of Social Services”, “Statewide Contract – Office Supplies”.

6. **Detailed Description** (Optional-Highly Recommended)

6.1. Enter in a complete description for the contract being created. This field accepts up to 2000 alpha numeric characters. Suggested information to include is the agency name, any award specific information, original contract period and potential expiration date, any mbe/wbe/sdve/blind/sheltered workshop participation, if applicable, identify as SFS contract.

(NOTE: The Description from the Solicitation will default if Contract is created from Solicitation)

The information entered in the Detailed Description will be visible from the contract link on the Contract Board.

7. **Master Contract Checkbox** (Optional) (see Activity 8 below for more details on Master Contract)

7.1. To designate this contract as a master contract which allows you to create a single contract to multiple vendors with one contract number for all vendors.

NOTE: Once designated as a Master contract, the Enable Contract as RoundTrip check box and Distributor section will be hidden from the Contract Header Information page as they are no longer viable options. To view the RoundTrip check box and Distributor section, clear the check box from the Master Contract field.

8. **Enable Contract as Roundtrip Checkbox** (N/A – Administered with Perfect Commerce)

8.1. No action is required. This box is used to enable this contract as RoundTrip. Enabling RoundTrip allows buying organizations to associate items from a vendor’s web site directly to the contract. This is coordinated with Perfect Commerce. Contracts that are RoundTrip enabled are identified by the RoundTrip icon in the Status column on the “View Current Contracts” page.

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9. **Pcard Accepted Checkbox** (Optional)
- 9.1. Defaults to No. Contracts that accept Pcards are not currently the norm, and need to have supplier discussions and other processes defined before turning this feature on.
10. **Contract Administrator**
- 10.1. The system automatically defaults to the contact information for the person creating the Contract. If you are creating the contract for another State of Missouri user, select their name from the available drop down format.
11. **Req Number**
- 11.1. No Action is required
- 11.2. The Req Number field is system populated if there is a Requisition associated with the solicitation that generated the contract and is displayed as read only. Otherwise, it is blank.
12. **Solicitation Number**
- 12.1. No Action is required
- 12.2. The Solicitation Number field is system populated when the Contract is created from a Solicitation and displayed as read only. Otherwise, it is blank.
13. **Commodities** (Optional-Highly Recommended that Commodities are selected so spend reporting can be conducted on the contract and the contract can be located when a user is processing a request for the products/services included in the contract.)
- (NOTE: The Commodities from the Solicitation will default if Contract is created from Solicitation)
- 13.1. **Note:** Commodities are Required in order for agency users to be able to enter a Request via the Off-Catalog screen, especially if there is no Catalog associated with this Contract. Click the **Select Commodities** button
- 13.2. The **Select Contract Commodities** page will open
- 13.2.1. Type in a Keyword or the Code for the commodity into the appropriate field

Select Contract Commodities

Search Clear Search

Available Commodities

Selected Commodities

- > ☐ Live Plant and Animal Material and Accessories an
- > ☐ Mineral and Textile and Inedible Plant and Animal
- > ☐ Chemicals including Bio Chemicals and Gas Mater
- > ☐ Resin and Rosin and Rubber and Foam and Film a
- > ☐ Paper Materials and Products (14000000)
- > ☐ Fuels and Fuel Additives and Lubricants and Anti c
- > ☐ Mining and Well Drilling Machinery and Accessorie
- > ☐ Farming and Fishing and Forestry and Wildlife Ma

13.2.2. Click the **Search** button and all commodity categories containing the keyword or code will appear in the Available Commodities box. Click on the appropriate commodity and it will appear in the Selected Commodities box.

13.2.3. Check the commodity or any level of sub-category(s) from the **Search Results** section

Available Commodities	Selected Commodities
<input type="checkbox"/> Industrial Manufacturing and Processing Machinery (2318) <ul style="list-style-type: none"> <input type="checkbox"/> Industrial food and beverage equipment (23181500) <ul style="list-style-type: none"> <input type="checkbox"/> Food fermentation device (23181518) <input type="checkbox"/> Food cutting machinery (23181600) <input type="checkbox"/> Food cooking and smoking machinery (23181700) <ul style="list-style-type: none"> <input type="checkbox"/> Food sterilizing machine (23181705) <input type="checkbox"/> Mass transfer equipment (23200000) <ul style="list-style-type: none"> <input type="checkbox"/> Industrial drying equipment (23201200) <ul style="list-style-type: none"> <input type="checkbox"/> Food drying equipment (23201204) <input type="checkbox"/> Material Handling and Conditioning Systems and Equipment (40140000) <ul style="list-style-type: none"> <input type="checkbox"/> Packaging materials (24120000) <ul style="list-style-type: none"> <input type="checkbox"/> Packaging cans (24121800) <ul style="list-style-type: none"> <input type="checkbox"/> Food cans (24121804) <input type="checkbox"/> Distribution and Conditioning Systems and Equipment (40140000) <ul style="list-style-type: none"> <input type="checkbox"/> Fluid and gas distribution (40140000) <ul style="list-style-type: none"> <input type="checkbox"/> Hoses (40142000) <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Food and beverage hose (40142012) <input type="checkbox"/> Laboratory and Measuring and Observing and Testing Equipment (41100000) <ul style="list-style-type: none"> <input type="checkbox"/> Laboratory and scientific equipment (41100000) <ul style="list-style-type: none"> <input type="checkbox"/> Animal laboratory equipment and accessories (41101000) <ul style="list-style-type: none"> <input type="checkbox"/> Research animal food and diet (41102610) 	<input type="checkbox"/> Distribution and Conditioning Systems and Equipment (40140000) <ul style="list-style-type: none"> <input type="checkbox"/> Fluid and gas distribution (40140000) <ul style="list-style-type: none"> <input type="checkbox"/> Hoses (40142000) <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Food and beverage hose (40142012)

13.2.4. Click the **CLOSE** button

13.2.5. The selected category will now appear in the **Selected Commodities** section of the page

Commodities
<input type="button" value="Select Commodities"/>
Selected Categories: <ul style="list-style-type: none"> <input type="checkbox"/> Distribution and Conditioning Systems and Equipment and Components (40140000) <ul style="list-style-type: none"> <input type="checkbox"/> Fluid and gas distribution (40140000) <ul style="list-style-type: none"> <input type="checkbox"/> Hoses (40142000) <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Food and beverage hose (40142012)

13.2.6. Repeat the above Commodity Category selection process as described above until all appropriate categories appear in the **Selected Commodities** section that are covered for the Contract

13.2.7. Click the **CLOSE** button

13.2.8. The system will return to the **Contract Header** page with the selected commodity categories now appearing in the **Commodities** section

Commodities
<input type="button" value="Select Commodities"/>
Selected Categories: <ul style="list-style-type: none"> <input type="checkbox"/> Distribution and Conditioning Systems and Equipment and Components (40140000) <ul style="list-style-type: none"> <input type="checkbox"/> Fluid and gas distribution (40140000) <ul style="list-style-type: none"> <input type="checkbox"/> Hoses (40142000) <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Food and beverage hose (40142012) <input type="checkbox"/> Service Industry Machinery and Equipment and Supplies (48000000) <ul style="list-style-type: none"> <input type="checkbox"/> Institutional food services equipment (48100000) <ul style="list-style-type: none"> <input type="checkbox"/> Food and beverage dispensing equipment (48101700) <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Carbonated beverage dispenser (48101701)

14. Contractor

(NOTE: The Contractor/Supplier from the Solicitation will default if Contract is created from Solicitation. The asterisk indicates this is a required field)

Contractor *
<input type="button" value="Search Contractors"/>

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14.1. If the Contract is not created from a Solicitation, click the **Search Contractors** button

14.2. The **Supplier Search** page will display

Supplier Search

Enter Supplier Name in text box and click the Search button. This will return all Supplier Names that begin with the characters entered, partial names are okay. An empty search will return no results, wildcard key is *.*.


Supplier Name *

☐ Advanced

Results			
Supplier	Doing Business As	Relevance	Action

14.3. Type the name of the supplier that will be associated with the contract being created

14.4. Click the **Search** button

14.5. Results are pulled from suppliers registered for MissouriBuys. Click the Select icon  for the desired Supplier




Supplier Search

Enter Supplier Name in text box and click the Search button. This will return all Supplier Names that begin with the characters entered, partial names are okay. An empty search will return no results, wildcard key is *.*.

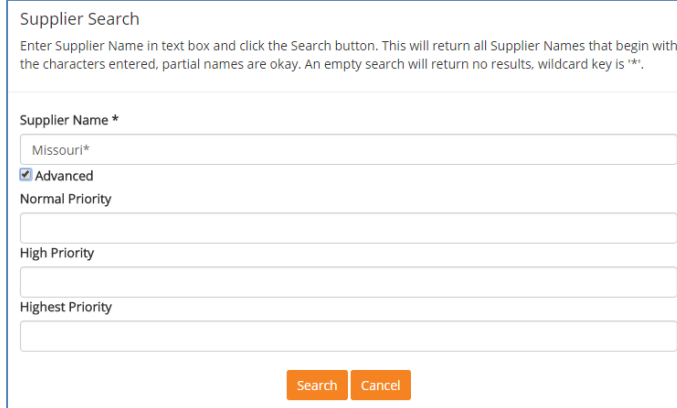
Supplier Name *

Missouri*

☐ Advanced

Results			
Supplier	Doing Business As	Relevance	Action
Association of Missouri Electric Cooperatives	Rural Missouri Magazine	71%	
Central Missouri Building Industries Association	HBA of Central Missouri	71%	
Court Appointed Special Advocates of Southwest MO	CASA of Southwest Missouri	71%	

- 14.6. FYI - Click the Advanced Search checkbox if you want to assign a weight to the search terms. Enter keywords for Normal, High and Highest priority.



Supplier Search

Enter Supplier Name in text box and click the Search button. This will return all Supplier Names that begin with the characters entered, partial names are okay. An empty search will return no results, wildcard key is *.*.

Supplier Name *

Missouri*

☒ Advanced

Normal Priority

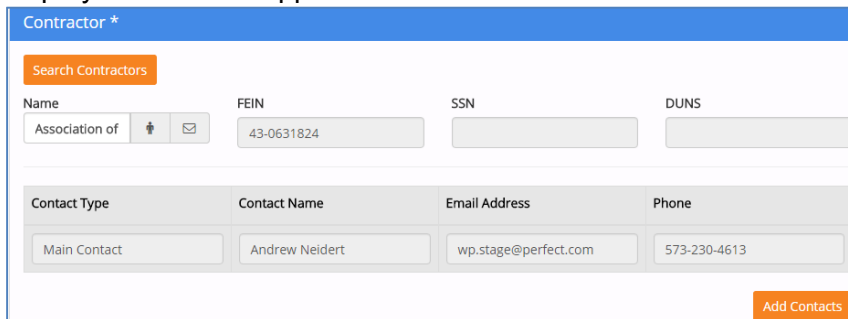
High Priority

Highest Priority

Search Cancel

- 14.7. Use process in 14.5 to select Contractor.

- 14.8. The system will return to the Contract **Header** page with the selected Supplier displayed and the Supplier's Main Contact within the **Contractor** section.



Contractor *

Search Contractors

Name Association of FEIN 43-0631824 SSN DUNS

Contact Type	Contact Name	Email Address	Phone
Main Contact	Andrew Neidert	wp.stage@perfect.com	573-230-4613

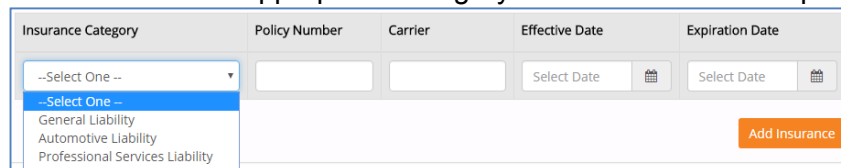
Add Contacts

- 14.9 Click **Add Contacts** button to create additional rows for additional vendor contacts, such as the Contract Contact at the Supplier/Vendor if they are not the Main Contact.

15. Insurance (Optional)

15.1. Insurance Category

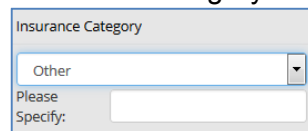
- 15.1.1. Select the appropriate category from the available dropdown



Insurance Category	Policy Number	Carrier	Effective Date	Expiration Date
--Select One-- General Liability Automotive Liability Professional Services Liability			Select Date	Select Date

Add Insurance

- 15.1.2. If you Select **Other**, another box will appear for you to specify your Title of Insurance Category:



Insurance Category

Other

Please Specify:

15.2. Policy Number

- 15.2.1. Enter the Suppliers Policy Number for the selected Insurance Category

15.3. Carrier



- 15.3.1. Enter the Carrier name for the Insurance Category

15.4. Effective Date

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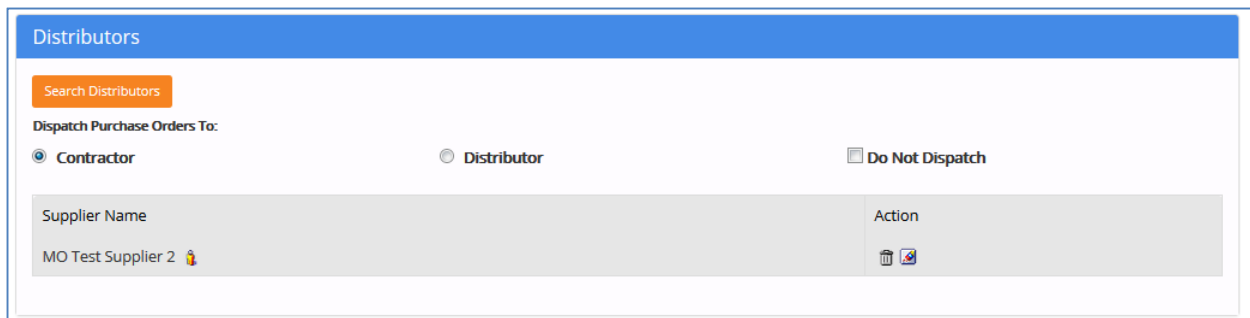
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- 15.4.1. Click on the Date selector icon 
- 15.4.2. Select an appropriate date for the Suppliers Insurance Effective Date.
- 15.5. **Expiration Date**
- 15.5.1. Click on the Date selector icon 
- 15.5.2. Select an appropriate date for the Suppliers Insurance Expiration Date.
- 15.6. Click on **Add Insurance** and Repeat steps 15.1-15.5.2 for additional insurances
16. **Distributors** (Optional)

Note: The Distributor section is to be used if there is a scenario of a Contract being held by a specific supplier but the items can be purchased from multiple suppliers based on an approved distribution list. Distributors must be registered as vendors in MissouriBUYS.

16.1. Dispatch Purchase Orders To:



- 16.1.1. When Purchase Orders are dispatched via the WebProcure system the **Dispatch Purchase Orders to:** setting determines what supplier entity will receive the Purchase Orders for Contract purchases. The Dispatch supplier is also the supplier from whom an invoice will be received at the time of billing and payment. The Contractor is the default setting to receive purchase orders and invoices.
- 16.1.2. Select the Distributor radio button  if the purchase orders for this specific contract should be dispatched to the selected Distributor of the items at the time of Purchase Order Dispatch

Note: The selection of **Dispatch Purchase Order To:** option can be changed during the contract **Creation** process prior to the contract being **Active**. After a Contract has reached the **Active** Status the **Dispatch Purchase Order To:** option cannot be modified.

- 16.2. The Selected Supplier displayed within the **Contractor** section will appear as the first entry under the **Distributor** section by default
- 16.3. Follow the same steps listed above for the **Contractor** section to add suppliers to this **Distributor** section (Steps 14.1 through 14.7)
- 16.4. Select the Do Not Dispatch check box, if the purchase orders for this specific contract should not be dispatched through the WebProcure system.

Key points for Distributors:

- The list of Distributors on a contract is based on suppliers approved for the agency that is creating the contract. If a Distributor is not an approved supplier for one of the contract's

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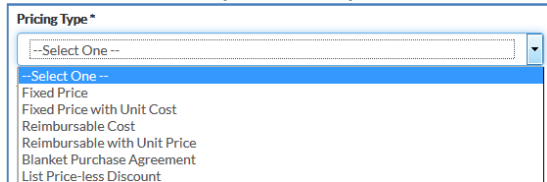
authorized organizations, then that Distributor will not be available to purchase products/services from the contract.

- If a Distributor is no longer valid, but the Contractor (aka vendor or supplier) is also on the Distributors list, the Purchase Order will be dispatched to the Contractor.
 - If a Distributor is no longer valid and there are not any other Distributors listed, then the Purchase Order will be dispatched to the Contractor.
-

17. Pricing Information section

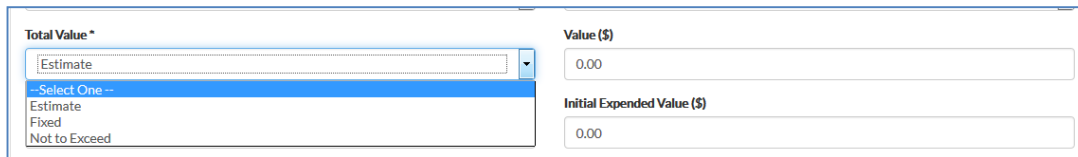
17.1. Pricing Type:

17.1.1. Select the appropriate option from the available drop down format (this is a label within the system only)



The screenshot shows a dropdown menu titled "Pricing Type *". The menu is open, displaying a list of options: "--Select One--", "Fixed Price", "Fixed Price with Unit Cost", "Reimbursable Cost", "Reimbursable with Unit Price", "Blanket Purchase Agreement", and "List Price-less Discount". The "--Select One--" option is currently selected and highlighted in blue.

17.2. Total Value:



The screenshot shows a form titled "Total Value *". It contains a dropdown menu with the following options: "Estimate", "--Select One--", "Estimate", "Fixed", and "Not to Exceed". The "Estimate" option is currently selected. To the right of the dropdown menu, there are two input fields: "Value (\$)" with a value of "0.00" and "Initial Expended Value (\$)" with a value of "0.00".

17.2.1. Select the appropriate option from the available drop down format

17.3. Value (\$):

17.3.1. Enter in a maximum dollar for the Contract. Agencies should enter an amount within their procurement authority (typically up to and including \$24,999.99). Exceptions: Establishing a contract under a SDA or establishing a contract for purchases that fall under an exempt object code. If renewing an existing contract, then the Total (\$) amount should reflect the previous contract period(s) plus the renewal period.

17.3.2. Applicable to State of Missouri Level - If the contract spend is unlimited the maximum amount that can be entered for this field is 999,999,999.99.

17.4. Initial Expended Value (\$):

17.4.1. **N/A for Contract Creation in most cases** – only used for Contract Migration on contracts that have some value already expended.

17.5. Retainage %

17.5.1. Percentage of an Invoice amount withheld from payment to a supplier. The percentage withheld will be paid at a later date based on the contract terms. Enter a value equal or less than 100.

17.6. Cumulative Expended Value / % Value to Go

17.6.1. System generated fields that captures spend and percent against a contract as Purchase Orders are processed through the **Order Management** module **Cumulative Expended Value (\$)** is automatically updated each time a purchase is made against the contract.

% Value to Go is the percentage of the remaining contract value that is automatically calculated. It will equal (Total Value - Cumulative Expended Value)*100/Total Value.

Cumulative Expended Value (\$)	% Value To Go
0.00	

17.7. **Payment Terms**

(NOTE: The Payment Terms from the Solicitation will default if Contract is created from Solicitation)

17.7.1. If the Contract is not created from a Solicitation, select the appropriate option from the available drop down format

17.8. **Payment Notes (Optional)**

17.8.1. Enter additional Payment Notes for Contract purchases

17.9. **Delivery Terms**

(NOTE: The Delivery Terms from the Solicitation will default if Contract is created from Solicitation)

17.9.1. If the Contract is not created from a Solicitation, select the appropriate option from the available drop down format

17.10. **Delivery Notes (Optional)**

17.10.1. Enter additional Delivery Terms for Contract purchases

17.11. **Other Notes**

17.11.1. Enter any additional Terms relating to the Contract Terms. The information entered as Other Notes will not be visible on the Contract Board. Suggested information to include is notes regarding amendments processed against the contract.

18. **Contract Period:**

18.1. **Issue Date**

18.1.1. The current date will default

18.1.2. Click on the Date selector icon

18.1.3. Select an appropriate date for the Contract Issue Date – This is the same date as the contract is awarded to the supplier.

18.2. **Award Date**

(NOTE: The Award Date from the Solicitation will default if Contract is created from Solicitation)

18.2.1. Click on the Date selector icon 

18.2.2. Select an appropriate date for the Contract Award Date - date the contract is awarded to the supplier

18.3. **Effective Date**

18.3.1. Click on the Date selector icon 

18.3.2. Select an appropriate date for the Contract Effective Date - the date the contract becomes active. Users may initiate requests against the contract starting on the Effective Date.

18.4. **Expiration Date**

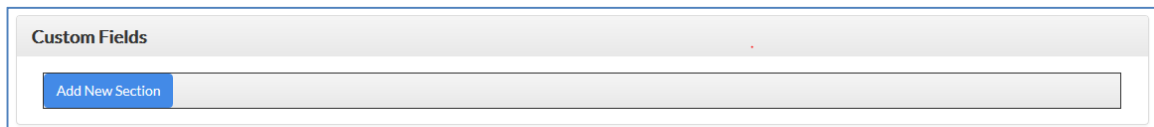
18.4.1. Click on the Date selector icon 

18.4.2. Select an appropriate date for the Contract Expiration Date - the date the contract ends. New requests cannot be initiated against an expired contract after the Expiration Date; only processing of existing requests may be performed.

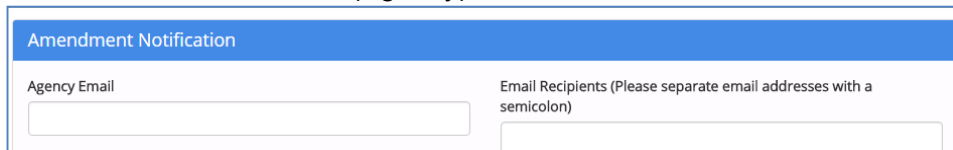
19. **Custom Fields** (N/A at this time)

19.1. **Custom Fields** can be added to the Contract Header

NOTE: Only Enterprise Administrators in the Office of Administration, Division of Purchasing can build/enable the Contract Header Custom Fields for use in Contract Documents. The Contract Header Custom Fields are not being used by the State of Missouri at this time.



20. **Amendment Notification (Agency)** (Optional)



20.1. **Agency Email**

20.1.1. Enter an (1) email address for a main contact to be notified of a **Contract Amendment**. Note: The auto-generated Amendment Notification indicates that the contract has been amended but does not provide details on what was changed in the contract.

20.2. **Email Recipients**

20.2.1. Include additional email address(s) for users that need to receive notification of a **Contract Amendment**

21. Event Notifications (Optional)

Event Notifications				
Number	Type	Trigger	Agency Email	Contractor Email
1.	Total Value	<input type="text" value="% To Go"/>	<input type="text" value="deidre.lines@perfect.cc"/>	<input type="text" value="wp.stage@perfect.com"/>
2.	Effective Date	<input type="text" value="Days To Go"/>	<input type="text" value="deidre.lines@perfect.cc"/>	<input type="text" value="wp.stage@perfect.com"/>
3.	Expiration Date	<input type="text" value="Days To Go"/>	<input type="text" value="deidre.lines@perfect.cc"/>	<input type="text" value="wp.stage@perfect.com"/>
4.	Insurance and Certification Expiration	<input type="text" value="Days To Go"/>	<input type="text" value="deidre.lines@perfect.cc"/>	<input type="text" value="wp.stage@perfect.com"/>

21.1. Total Value

21.1.1. Dependent on the value entered into the **Total Value** field within the **Pricing Information** section

21.1.2. % To Go

21.1.2.1. Enter a numeric value to trigger a notification

21.1.3. Agency Email

21.1.3.1. Enter an email address for a State of Missouri user to receive the system generated notification

21.1.4. Contractor Email

21.1.4.1. Enter an email address for the appropriate person within the Vendor's organization to receive the system generated notification

21.2. Effective Date

21.2.1. Dependent on the date selected for the **Effective Date** field within the **Contact Period** section

21.2.2. Days To Go

21.2.2.1. Enter a numeric value to trigger a notification

21.2.3. Agency Email

21.2.3.1. Enter an email address for a State of Missouri user to receive the system generated notification

21.2.4. Contractor Email

21.2.4.1. Enter an email address for the appropriate person within the Vendor's organization to receive the system generated notification

21.3. Expiration Date

21.3.1. Dependent on the date selected for the **Expiration Date** field within the **Contact Period** section

21.3.2. Days To Go

21.3.2.1. Enter a numeric value to trigger a notification

21.3.3. Agency Email

21.3.3.1. Enter an email address for a State of Missouri user to receive the system generated notification

21.3.4. Contractor Email

21.3.4.1. Enter an email address for the appropriate person within the Vendor's organization to receive the system generated notification

21.4. Insurance and Certificate Expiration

21.4.1. Dependent on the date selected for the **Expiration Date** field within the **Contractor** section

21.4.2. Days To Go

21.4.2.1. Enter a numeric value to trigger a notification

21.4.3. Agency Email

21.4.3.1. Enter an email address for a State of Missouri user to receive the system generated notification

21.4.4. Contractor Email

21.4.4.1. Enter an email address for the appropriate person within the Vendor's organization to receive the system generated notification

22. Custom Notifications (N/A at this time)

NOTE: Only State Administrators in the Office of Administration, Division of Purchasing can build/enable Custom Notifications in the Notification Library. The Custom Notifications are not being used by the State of Missouri at this time.

Name	Agency Email	Contractor Email
No custom notifications have been added to this contract		

Add Notification from Library

22.1. Click on the **Add Notification from Library** button to view Notifications

22.2. Notifications will be listed along the left side, click on the appropriate

notification template and click **Next** button:

Select a Notification Template

Customize and add notification

Quarterly Contract Administration Fee

Yearly Site Visit

Contract Renewal Requirements

Annual Subcontract Spending

Subject

Upcoming Annual Subcontract Spending Due

Message

To Contractor,

According to the terms of your contract, annual subcontracting spend data is required to be submitted to the State of Missouri Purchasing Department. Please complete the required details and submit back to us by XX/XX/XXXX.

Thank you,

Contract Administrator
State of Missouri Purchasing

Next

Cancel

22.3. Select your notification frequency, Customize your Notice and Add to Contract:

Select a Notification Template **Customize and add notification**

Name
Annual Subcontract Spending

Subject
Upcoming Annual Subcontract Spending Due

☒ **One Time Notification**
Notification Date
02/08/2016

☐ **Recurring Notification**

Message

To Contractor,

According to the terms of your contract, annual subcontracting spend data is required to be submitted to the State of Missouri Purchasing Department. Please complete the required details and submit back to us by XX/XX/XXXX.

Thank you,

Contract Administrator
State of Missouri Purchasing

Back Add to Contract Cancel

22.4. Notification now appears on Header page. Add more notifications (if needed)

by clicking the **Add Notification from Library** button

Custom Notifications

Name	Agency Email	Contractor Email
Annual Subcontract Spending Start Date : 02/08/2016 Repeat : Repeats every 1 year(s), on February 8	carol.capek@perfect.com	deidre.lines@perfect.com

Add Notification from Library

23. Click the Next Step icon **Next Step** to continue with the Contract Creation process

Activity 1.2 Contract Clauses page – N/A at this time

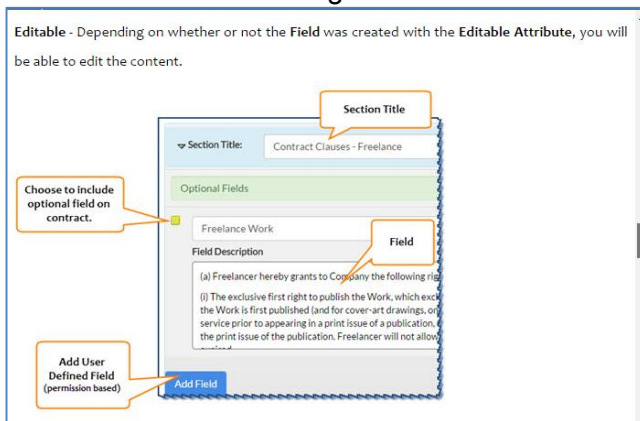
Contract Clauses

Enter one or more clauses. Preset clauses (if any) applicable to this contract type have been automatically added.

Add New Section

- Only State Administrators in the Office of Administration, Division of Purchasing can build/enable Contract Clauses. The Contract Clauses section is not being used by the State of Missouri at this time. The **Contract Clauses** page is available to insert optional Document Library Fields/Contract Clauses for Contracts by clicking "Add

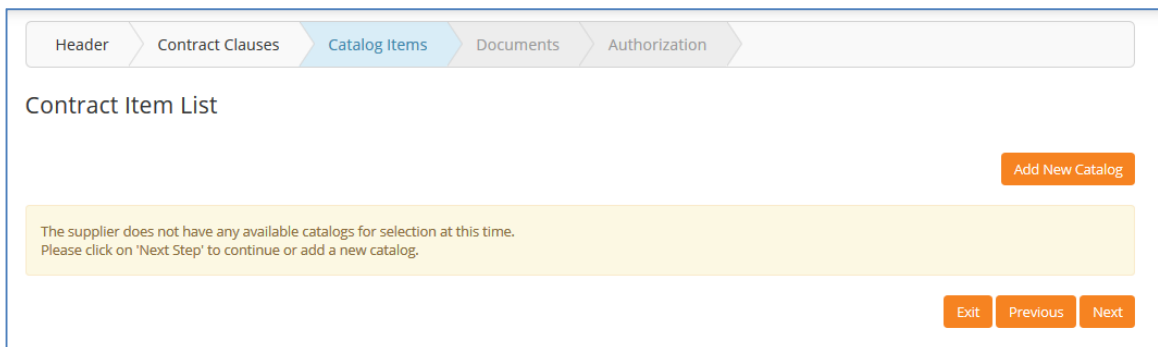
New Section” and building from there.



2. Click the **Next** icon to continue with the Contract Creation process

Activity 1.3 Contract/Catalog Item List page

1. The **Contract Item List** page is available to administer catalogs associated with a contract. A catalog contains the line items (goods/services) included in the contract that are available for purchase via a request in the Order Management module of MissouriBUYS. A Contract will be created prior to a catalog creation and association to a contract. The catalog association process to a contract is covered in Addendum 1 of this document.





2. Click the **Next** icon to continue with the Contract Creation process



Activity 1.4 Documents page

Documents can be attached to a Contract from the Library or a new document from the user's computer can be uploaded. Any type of attachment can be uploaded. The number of attachments uploaded is not limited; however, the size of each attachment must not exceed 80 MB.

1. Click the **Upload New Document** button. (NOTE: Upload Documents from Library is only available to certain State of Missouri users – N/A for most users)
2. Click the **Browse...** button
3. Select a document from your computer and click the **Open** button.



4. Click the  button.
5. Click the  icon to continue with the Contract Creation process
6. NOTE: the Visibility of the Contract affects the Documents attachment and visibility
 - 6.1. If a Contract is Private, then no visibility options show up – as all documents are also then Private:

Contract Documents

Select	Type	Document Name	Upload Date	Delete
<input checked="" type="checkbox"/>		MODOT Internet Access Guest Account.docx	Feb 16, 2016	



- 6.2. If a Contract is Public (appears on the Contract Board), then there is a visibility option to make each document Public or Private:

Contract Documents

Select	Type	Visibility	Document Name	Upload Date	Delete
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Private <input type="checkbox"/> Public	MODOT Internet Access Guest Account.docx	Feb 16, 2016	

- 6.3. Toggle the switch to Public if desire documents to be public and available through the Contract Board.

Contract Documents

Select	Type	Visibility	Document Name	Upload Date	Delete
<input checked="" type="checkbox"/>		<input type="checkbox"/> Private <input checked="" type="checkbox"/> Public	MODOT Internet Access Guest Account.docx	Feb 16, 2016	

Activity 1.5 Authorization

1. Each State of Missouri organization (agency) and its sub organizations will be listed on the **Authorization** page. Selecting an organization(s)/sub organization(s) allows the Contract to be seen by users in that organization(s)/sub organization(s), and allows authorized users to process Requests for Contract Release against the Contract. The amount entered as the Total (\$) in the Pricing Information section in the Header tab is the limit that can be purchased against the contract.
 NOTE: If additional limits are needed by organization the **Authorized Amount (\$)** by Organization can be defined to limit the total amount of Contract Releases allowed for that Organization (e.g. to split a \$20,000 contract to \$5,000 for 4 different sub organizations versus 1st come 1st served to the \$20,000 across the 4 sub organizations). Also, the Release Limit per contract can be defined but is not being used by the State of Missouri at this time.

NOTE: When setting up contracts, make sure to select “State of Missouri” as well as the organization(s) and sub organization(s) authorized to view and use the contract and the associated catalog (line items).

Therefore, when revising a contract from unissued to active, the buyer should ensure to select “State of Missouri” along with the using organization(s) and sub organization(s) when activating the contract. For contracts that are already active, when the buyer adds the CAT and the PRC spreadsheet to the contract they can then select “State of Missouri” as an authorized user.

Contract Authorization

Header > Contract Clauses > Catalog Items > Documents > **Authorization**

Use the check box to select all Organizations with access to the Contract. Selecting an Organization will automatically select all of its Sub-Organizations. Remove access to the Contract for any Organization, or Sub-Organization, by deselecting the check box.

Note: You can only authorize those organizations for which the supplier is active.

Total Contract Amount: 999999999.99

Authorized to use Contract	Organization	Authorized Amount (\$)	Release Limit (\$)
<input type="checkbox"/>	State of Missouri	0	Not Defined
<input type="checkbox"/>	Attorney General	0	Not Defined
<input type="checkbox"/>	Missouri Office of Prosecution Serv	0	Not Defined
<input type="checkbox"/>	DED - Dept of Economic Development	0	Not Defined
<input type="checkbox"/>	DED Admin	0	Not Defined

- Select the checkbox ☐ within the **Authorization to use Contracts** column for each organization that requires access to the Contract.
OR scroll to the bottom of the page

<input type="checkbox"/>	Missouri Western State University	0	Not Defined
<input type="checkbox"/>	Northwest Missouri State University	0	Not Defined
<input type="checkbox"/>	Southeast Missouri State University	0	Not Defined
<input type="checkbox"/>	Public Defender	0	Not Defined
<input type="checkbox"/>	Secretary of State	0	Not Defined
<input type="checkbox"/>	State Auditor	0	Not Defined
<input type="checkbox"/>	State Treasurer	0	Not Defined

Previous Finished **Select All** De-Select All Exit

- Applicable to State of Missouri Level - Click the **Select All** button to select all the listed organizations for Contract access
- Click the **Finished** button to complete the Contract Creation process
- The **Summary** page of the contract will display. Upon verifying that the contract is complete click one of the following buttons:

View History Approval Preview Submit Close

- View History** will show you list of actions taken on this contract
- Approval Preview** will show you the Approval Steps this Contract will flow through before it is issued.
- Close** will close the Contract so you can come back and edit it (i.e. if you have to go create the Catalog and come back to the Contract prior to Submitting it for Approval/Issuance.)

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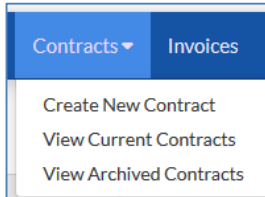
09/16/2016

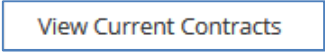


- 5.4. **Submit** if you are totally complete and ready for the Contract to be Approved and Issued (i.e. made Active based on Effective Date).

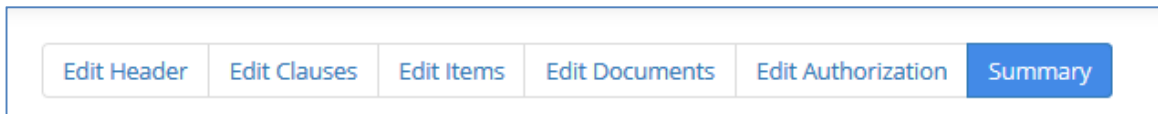
Note: There is the option to have a **Contract Approver** at the sub-organization level. This means that is a Contract Approver if established for a sub-organization will be triggered for approval workflow for every user that creates a contract within the sub-organization. This will be reflected above in the Approval Preview


Activity 2 Edit/Amend an existing Contract

1. Select Contracts Dropdown from the **Home** page



2. Click the  from the dropdown
3. Locate the contract you are interested in modifying
4. Click the Edit  icon from the **Actions** column (or the Create Amendment  icon for Issued and Active Contracts)
5. The **Summary** page displays in an editable state
6. There are two available steps to select the section to modify
- 6.1. Click an option from the contract navigation bar OR



- 6.2. Scroll to the  button available for each of the main sections of the Contract
- NOTE:** If Select Edit Header and the Contract doesn't have standard numbering – please review your Contract Number to remove the defaulted Contract Type Prefix (as this automatically applies). Also verify that the document number remains 11 digits or less.

- 6.3. Upon selection of the Contract page requiring modification, follow the steps within **Activity 1** to make any edits necessary. The contract is now locked until you are finished editing. It is considered “checked out” until the content is saved and the user is no longer actively editing. A different user will see a lock icon with the contract's status in the list view. Upon clicking on this lock icon a user is informed what this icon means and what user currently has the contract “checked out”.

Current Contracts

Contractor: Organization: Perfect City Buyer: ALL Status: ALL Content: All

Commodity: Authorized Organization: All Contract Title: Contract Number:

Contract #	Title	Contractor	Organization	Buyer	Effective Date	Expiration Date	Status	Actions
00001	VEHICLE, LIGHT DUTY PICKUPS	Master Contract	Perfect City	Rese Cleaver	November 19, 2014	November 24, 2017	Active	
00001	VEHICLE, LIGHT DUTY PICKUPS	Master Contract	Perfect City	Rese Cleaver	November 19, 2014	November 24, 2017	Amendment Pending	

Current Contracts

Contractor: Organization: Perfect City Buyer: ALL Status: ALL Content: All

Commodity: Authorized Organization: All Contract Title: Contract Number:

Locked by
Rese Cleaver
(jamie.moore@perfect.com)

Contract #	Title	Contractor	Organization	Buyer	Effective Date	Expiration Date	Status	Actions
00001	VEHICLE, LIGHT DUTY PICKUPS	Master Contract	Perfect City	Rese Cleaver	November 19, 2014	November 24, 2017	Active	

6.4. After modifications have been made on a Contract section page click the button to apply the modifications to the current **Contract Amendment** version of the contract.

6.5. Click the button to return to the **Summary** page of the contract to verify your modifications

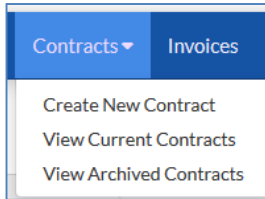
6.6. Scroll to the bottom of the **Summary** page and click the button if you are totally complete and ready for the Contract Amendment to be Approved and Issued (i.e. made Active based on Effective Date).


6.7. Populate Change reason box if prompted – depending on change, will prompt in different spots:

Enter Contract Modification Description

Activity 3 Copy an existing Contract

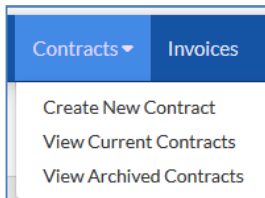
1. Select Contracts Dropdown from the **Home** page




2. Click the **View Current Contracts** from the dropdown
3. Locate the contract you are interested in copying
4. Click the Copy icon 
5. A new Contract will be created copying the parameters of the original contract except for the following parameters:
 - 5.1. Contract Number
 - 5.2. Contract Items List (Catalog items)
 - 5.3. Organization for Authorization—no organizations are selected for the new contract being created via the Copy Contract process
6. Complete all steps for Contract Creation as detailed in [Activity 1](#)

Activity 4 Contract History

1. Select Contracts Dropdown from the **Home** page



2. Click the **View Current Contracts** from the dropdown
3. Locate the contract in which you are interested
4. Click the Contract History icon 
5. The **Contract Modification History** page will display

Date and Time	User	Description
Tue, 1 Dec 2015 11:05:21 AM	Enterprise Administrator	New Contract Created
Tue, 1 Dec 2015 11:05:47 AM	Enterprise Administrator	Organization State of Missouri - added
Tue, 1 Dec 2015 11:08:32 AM	Enterprise Administrator	Header Updated
Tue, 1 Dec 2015 11:08:37 AM	Enterprise Administrator	Contract Submitted
Tue, 1 Dec 2015 12:19:33 PM	Enterprise Administrator	Amendment Created of Contract Number CT-P with new ID 5
Tue, 1 Dec 2015 12:20:22 PM	Enterprise Administrator	Modified Contract#
Tue, 1 Dec 2015 12:20:22 PM	Enterprise Administrator	Contract number is changed
Tue, 1 Dec 2015 12:20:30 PM	Enterprise Administrator	Amendment Submitted
Tue, 1 Dec 2015 12:20:30 PM	Enterprise Administrator	Contract number is changed



Return






- View the contract modification history entries
- Click the **Return** button

Activity 5 Contract Revision History

- Select Contracts Dropdown from the **Home** page



Contracts ▼	Invoices
Create New Contract	
View Current Contracts	
View Archived Contracts	






- Click the **View Current Contracts** from the dropdown
- Locate the contract in which you are interested
- Click the Revision History icon 
 - The presence of the Revision History icon  is the indicator in the **Actions** column that a contract has had an Amendment issued
- The **Contract Revisions** page will display

Select	Version	Title	Contractor	Organization	Buyer	Created Date	Effective Date	Expiration Date	Status	Actions
<input type="checkbox"/>	Original	Gun Ammunition	Alamar Uniforms	State of Missouri	Enterprise Administrator	December 09, 2015	December 09, 2015	December 09, 2016	Amended	
<input type="checkbox"/>	Amendment 1	Gun Ammunition	Alamar Uniforms	State of Missouri	Enterprise Administrator	December 14, 2015	December 09, 2015	December 09, 2016	Active	
<input type="checkbox"/>	Amendment 2	Gun Ammunition	Alamar Uniforms	State of Missouri	Enterprise Administrator	February 04, 2016	December 09, 2015	December 09, 2016	Amendment Pending	  

Close Compare Revisions

- Each existing version will have a value in the **Version** column

7. Click the checkbox  for 2 versions
8. Click the **Compare Revisions** button
9. The modifications between the selected versions will be highlighted in yellow and have an Amendment icon  present

Contract Number - CC1120915 Version - Original			Contract Number - CC1120915 Version - Amendment 2		
Header Information					
General Information			General Information		
Issue Date	Dec 09, 2015		Issue Date	Dec 09, 2015	
Status	Amended 		Status	Amendment Pending 	
Title	Gun Ammunition		Title	Gun Ammunition	
Access	Private		Access	Private	
Description	Ammunition Various Types		Description	Ammunition Various Types	
Contract Administrator	Enterprise Administrator		Contract Administrator	Enterprise Administrator	
Email Address	wp.stage@perfect.com		Email Address	wp.stage@perfect.com	
Organization	State of Missouri		Organization	State of Missouri	
Items					
No Items 			Total Items On Contract 10 items  		
Document					
No Docs			No Docs		
Authorization					
Authorized Organization	Authorized Amount (\$)	Release Limit (\$)	Authorized Organization	Authorized Amount (\$)	Release Limit (\$)
State of Missouri	0.00	0.00	State of Missouri	0.00	0.00
OA - Purchasing	0.00	0.00	OA - Purchasing	0.00	0.00
MDA - Dept of Agriculture	0.00	0.00	MDA - Dept of Agriculture	0.00	0.00

10. Click the **Close** button to return to the Contract Revisions page
11. Click the **Close** button to return to the **Current Contracts** page

Activity 6 Other Contract Features










1. Select Contracts Dropdown from the Home page

Contracts ▼	Invoices
Create New Contract	
View Current Contracts	
View Archived Contracts	










2. Click the View Current Contracts from the dropdown
3. Locate the contract in which you are interested - various icons appear based on the status and the origination (i.e. from Solicitation or Not, Releases against the Contract or not, Amendments done or not)
4. If Unissued, below icons may be displayed:

Status	Actions
Unissued	      









5. If Issued, below icons may be displayed:

Status	Actions
Issued 	       











6. If Active, below icons may be displayed:


Status	Actions
Active 	       

7. If Amendment pending, below icons may be displayed:

Status	Actions
Amendment Pending	       

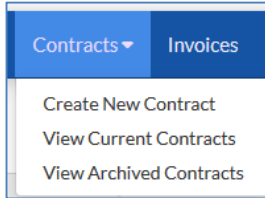
8. See below for icon details:


1. Click the Edit  icon to modify the Contract.
2. Click the Copy  icon to make a copy of the Contract.
3. Click the Print  icon to see a view of the Contract and make a printable version of the Contract.
4. Click the Delete  icon to delete the draft/in process Contract/Contract Amendment.
5. Click the Contract History  icon to see the actions performed on the Contract.
6. Click the Contract Release  icon to see the list of Contract Releases processed against the contract.
7. Click the View Solicitation Details  icon to see the associated solicitation, if applicable, that the Contract was created from.
8. Click the Create Amendment  icon to modify the Contract.
9. Click the Cancel  icon to cancel/close the Contract
10. Click the Approval Map  icon to see the Workflow and status of the approvals on the Contract/Contract Amendment.

11. Click the Revision History  icon to see the Contract and the Contract Amendment(s) (Revisions).
- 12.

Activity 7 Archived Contract Features

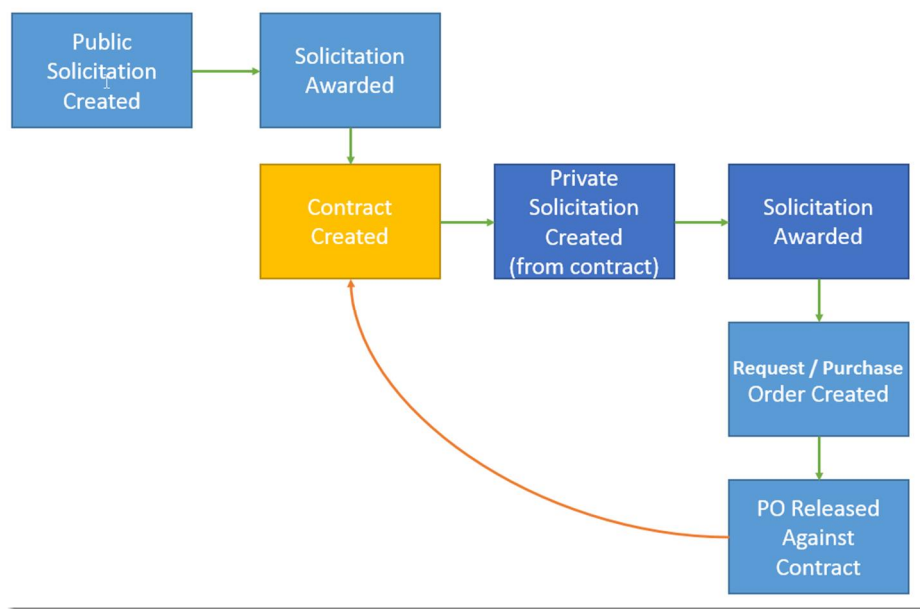
1. Select Contracts Dropdown from the **Home** page



2. Click the  from the dropdown
3. Archived Contracts are expired or canceled contracts.
4. Locate the contract in which you are interested
5. Select the functionality you'd like to perform on the Expired Contract. Icons and processes are similar to the Current Contracts processes in sections above.

Activity 8 Master Contracts Information

WebProcure/MissouriBUYS includes the ability to establish contracts for a pool of suppliers who are then allowed to bid on subsequent Statements of Work (SOW) or Work Orders. Buying organizations will benefit from expedited ordering of services and goods by working with pre-qualified, capable suppliers, ensuring that the best and most competitive prices are garnered. The following flow-chart provides an overview of the process.



- Create initial public solicitation for services or goods to identify qualified suppliers.
- Evaluate supplier responses and requirements, questionnaires, if any.
- Award solicitation to multiple qualified suppliers – convert award to master contract.
- Generate private solicitation from the contract.
- Evaluate supplier responses and requirements, questionnaires, if any.
- Award private solicitation to supplier.
- Generate request/purchase order from awarded solicitation.
- Purchase order released against contract – spend is tracked in contract.

Key Points about Creating a Master Contract

- Master contracts cannot contain catalog content.
- Master contracts may be created from scratch.
- Master contracts may be generated from an awarded and finalized solicitation.
 - Only items that are in the solicitation commodity category or categories may be added.
- If contract is identified as a master contract, the RoundTrip checkbox will be hidden.
- If contract is identified as a master contract, the Distributor's section will be hidden.
- Master contracts may include multiple contractors; insurance information may be added for each one.

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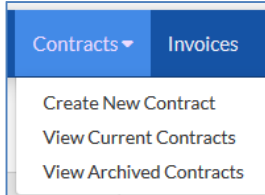
09/16/2016



Addendum 1 Catalog Association

Addendum Activity 1 Associate a Catalog to an Existing Contract

NOTE: See Addendum Activity 3 ó Generate Catalog from Archived Solicitation prior to proceeding below.

1. Select Contracts Dropdown from the **Home** page

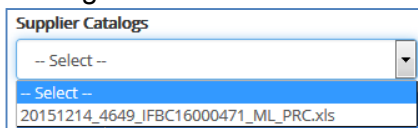


2. Click the **View Current Contracts** from the dropdown
3. Locate the Contract that is ready for catalog association from the **Contract #** column
4. If Contract is not Active, click the Edit icon  from the Actions column for the Contract. If Contract is Active, click the Create Amendment icon  from the Actions column.

5. Select the **Edit Items** icon from the navigation bar at top of page (or scroll down to Catalog Items Section and click the **Edit** button)
6. The Contract Item List page will open

A screenshot of the 'Contract Item List' page. At the top, it says 'Contract Item List'. Below that is a section titled 'Supplier Catalogs' with a dropdown menu showing '-- Select --'. To the right of the dropdown are three orange buttons: 'Add New Catalog', 'Browse Catalog', and 'Add All Items'. Below these is a light blue instruction box that says 'Select a Catalog and Click on 'Browse Catalog' to search and add items.' At the bottom right are two orange buttons: 'Save' and 'Return'.

7. Using the **Supplier Catalogs** drop-down box, select the desired Price file for the catalog to be associated to the contract.



Note: All catalogs that are associated to the Supplier within the WebProcure system will be included in the drop down box format. Select the file name for the specific catalog that belongs to the contract that you are currently modifying.

8. The Catalog will load:

Contract Item List					
Supplier Catalogs					
-- Select --			Modify Catalog	Browse Catalog	Add All Items
			Add Items to Catalog		Delete All
Unit	Item Description	Manufacturer	Supplier Part Number	Unit Price (USD)	Actions
CS	Ammunition .38 Caliber 148 Grain Wad Cutters state Packaging: 50Rd/Box, 10Box...	Remington	38S3	\$240.10	
CS	Ammunition .38 Caliber 158 Grain Lead Round Nose. State Packaging: Remington ...	Remington	L38S5	\$230.24	
CS	Ammunition .38 Caliber 158 Grain Semi-Wad Cutters State Packaging: 50Rd/Box, ...	Remington	38S6	\$246.32	
CS	Pistol Ammunition: .40 S & W Caliber New Brass Practice Ammo Jacketed Hollow ...	Remington	L40Sw3	\$262.30	
CS	Remington Golden Saber, No Substitution Caliber: .40 S & W# Gsb40Swb - 180 G...	Remington	Gsb40Swb	\$357.98	
CS	Rifle Ammunition: .223 Caliber55 Grain, Pointed Soft	Remington	R223R1	\$363.69	

9. Click
10. Verify that all catalog items are correct by drilling into the different commodity level available on the **Contract Item Search** page.
11. Once you have verified that all items are displayed and accurate for the Contract catalog, click
12. Click
13. A popup up window will ask if you want to add all the items.
14. Click the OK button in the system message box
15. Click the Return button to return to the **Contract Summary** page.

Addendum Activity 1.1 Edit Authorization page

1. Click the **Edit Authorization** option from the sub-navigation bar

Edit Header	Edit Clauses	Edit Items	Edit Documents	Edit Authorization	Summary
-------------	--------------	------------	----------------	---------------------------	---------
2. Review the organizations and sub-organizations that are authorized to purchase from the Contract Catalog items by the presence of a checkmark in the **Authorized to use Contract** column. **Make sure that "State of Missouri" is selected.**
3. Applicable to State of Missouri Level - If selection of all the listed organizations and sub-organizations is required, click the Select All button
4. If only certain listed sub-organizations need selection, click the checkbox beside the required sub-organization(s) name and then click the Save button
5. If the Authorization selection of sub-organizations does not require modification click the Return button

Addendum 2 Update Catalog

1. Select Contracts Dropdown from the **Home** page


Contracts ▾

Invoices

Create New Contract

View Current Contracts

View Archived Contracts

- Click the **View Current Contracts** from the dropdown
- Locate the Contract that is ready for catalog association from the **Contract #** column
- Click the Edit icon  from the Actions column for the Contract
- Select the **Edit Items** icon from the navigation bar at top of page (or scroll down to Catalog Items Section and click the **Edit** button)
- The Contract Items List page will open

Contract Item List

Supplier Catalogs

-- Select --













Modify Catalog


Browse Catalog

Add All Items

Add Items to Catalog

Delete All

Unit	Item Description	Manufacturer	Supplier Part Number	Unit Price (USD)	Actions
CS	Ammunition .38 Caliber 148 Grain Wad Cutters state Packaging: 50Rd/Box, 10Box...	Remington	3853	\$240.10	 
CS	Ammunition .38 Caliber 158 Grain Lead Round Nose. State Packaging: Remington ...	Remington	L3855	\$230.24	 
CS	Ammunition .38 Caliber 158 Grain Semi-Wad Cutters State Packaging: 50Rd/Box, ...	Remington	3856	\$246.32	 
CS	Pistol Ammunition: .40 S & W Caliber New Brass Practice Ammo Jacketed Hollow ...	Remington	L405w3	\$262.30	 
CS	Remington Golden Saber, No Substitution Caliber: .40 S & W# Gsb40Swb - 180 G...	Remington	Gsb40Swb	\$357.98	 
CS	Rifle Ammunition: .223 Caliber55 Grain, Pointed Soft	Remington	R223R1	\$363.69	 

- Select the item you want to modify and click on the edit icon 
- Opens that item:

Contract Item List

Supplier Catalogs

-- Select --



Modify Catalog

Browse Catalog

Add All Items

Add Items to Catalog

Delete All

Unit	Item Description	Manufacturer	Supplier Part Number	Unit Price (USD)	Actions
EA	<div>Training A</div> <div>Long Description: Training A for employees Training A</div>	No Manufacturer specified	2001	25.0000	 

- Update details – Item Description, Long Description, Unit Price

Unit	Item Description	Manufacturer	Supplier Part Number	Unit Price (USD)	Actions
EA	<input type="text" value="Training A (rev)"/> Long Description: <input type="text" value="Training A for employees Training A (revised price 5/25/16)"/>	No Manufacturer specified	2001	<input type="text" value="26.0000"/>	

Modify Catalog

10. Then click

11. Brings up changes for review:

Review Catalog Changes

Total number of items edited : 1

<input type="checkbox"/>	Supplier Part Number	Item Description	Long Description	Unit Price(USD)	Actions
<input type="checkbox"/>	2001	Training A (rev)	Training A for employees Training A (revised price 5/25/16)	\$26.0000	

Back
Abort Selected Changes
Commit Changes
Cancel

12. Then click Commit Changes and message confirmation pops up:

Clicking OK will modify the existing supplier catalog.
Changes will come into effect once the amendment becomes active.
Are you sure you wish to continue?

OK
Cancel

13. Click OK, returns to the Contract Item List:

Contract Item List

Supplier Catalogs
-- Select --

Modify Catalog
Browse Catalog
Add All Items
Add Items to Catalog
Delete All

Unit	Item Description	Manufacturer	Supplier Part Number	Unit Price (USD)	Actions
EA	<input type="text" value="Training A (rev)"/> Long Description: <input type="text" value="Training A for employees Training A (revised price 5/25/16)"/>	No Manufacturer specified	2001	<input type="text" value="26.0000"/>	
EA		No Manufacturer specified	2002	\$15.00	
EA		No Manufacturer specified	2003	\$18.00	

14. Click Save at bottom of page and returns to Summary page

15. Submit Contract Update

16. Populate Change reason box if prompted – depending on change, will prompt in different spots:

A screenshot of a software dialog box titled "Enter Contract Modification Description". The dialog box has a light blue border and a close button (X) in the top right corner. Inside the dialog, there is a large, empty text input area with a blue border. Below the text area, there is an orange button labeled "OK".

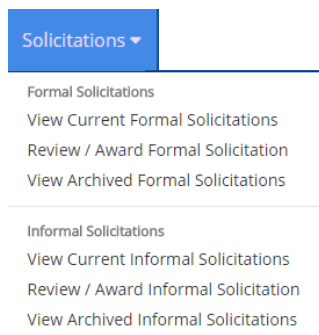
17. Once Contract Workflow completes the new changes will be effective with the Amended Contract.

Addendum 3-Generate Catalog from Archived Solicitation

Option 1 – Supplier Part Numbers Provided (or No Modifications Needed)

Generate Catalog from Archived Solicitation – Option 1, Supplier Part Numbers Provided, proceed just below if Supplier Part Number and/or Part Number extension fields were completed by Supplier during response period for every solicitation item they were awarded or if no modifications are needed to the catalog file that will generate from the responses; otherwise, proceed to Option 2 – Supplier Part Number fields not Completed.

1. Select Solicitations Dropdown from the **Home** page



2. Click “View Archived Formal Solicitations” or “View Archived Informal Solicitations” from the dropdown, locate and open the archived solicitation.

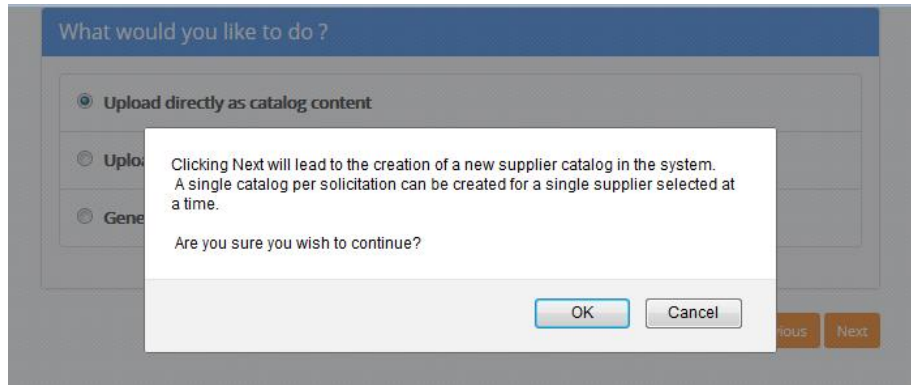
Generate Catalog

3. Select **Generate Catalog** at the bottom of the archived solicitation. The Select Supplier box will appear. Select Next.
4. The “What would you like to do?” box will appear.

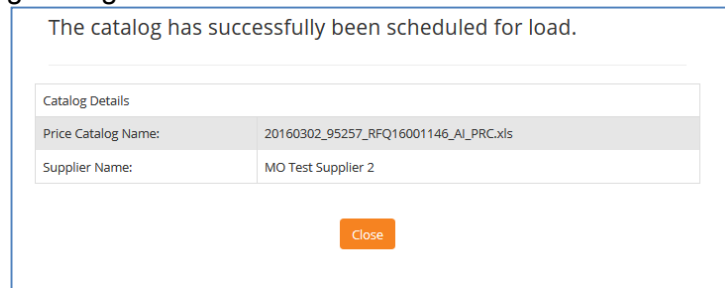
A screenshot of a dialog box titled 'What would you like to do?'. It contains three radio button options: 'Upload directly as catalog content' (which is selected), 'Upload catalog content files', and 'Generate content files'. At the bottom right of the dialog box, there are three buttons: 'Close', 'Previous', and 'Next'.

5. The “Upload directly as catalog content” (Direct catalog option) option should be selected.

- Click Next on “What Would You Like to Do” screen above. Get Next Process Screen:



- Click OK to proceed to generate the Catalog Files (or Cancel if not ready)
- Catalog Files generated and indicated on screen

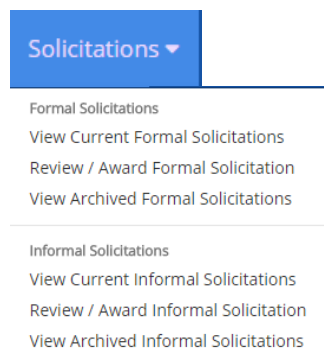


- Click Close
- Complete steps in **Addendum 1 Catalog Association**.

Option 2, Supplier Part Number fields not completed (or Modifications Needed)


Generate Catalog from Archived Solicitation – Option 2, Supplier Part Numbers Fields Not Completed (or modification to files from Solicitation needed).

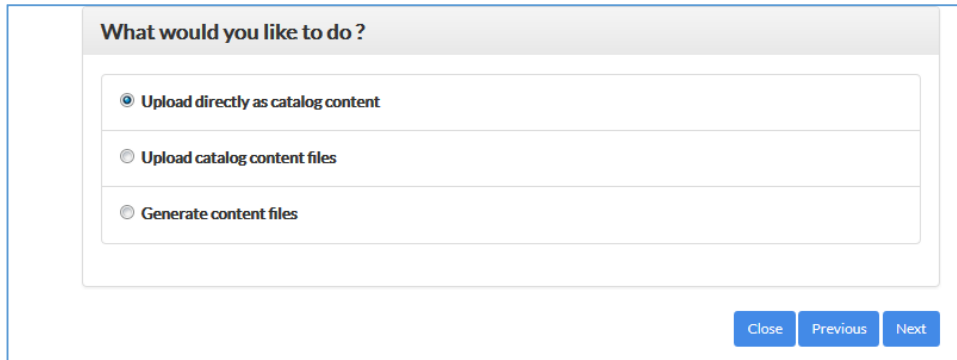
- Select Solicitations Dropdown from the **Home** page



- Click “View Archived Formal Solicitations” or “View Archived Informal Solicitations” from the dropdown, locate and open the archived solicitation.

Generate Catalog

3. Select  at the bottom of the archived solicitation. The Select Supplier box will appear. Select Next.
4. The “What would you like to do?” box will appear.



What would you like to do ?

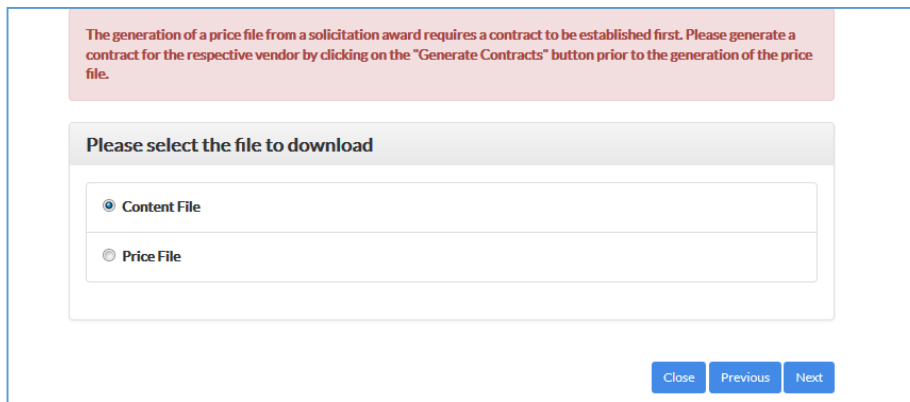
☒ Upload directly as catalog content

☐ Upload catalog content files

☐ Generate content files

Close Previous Next

5. The “Generate content files” (third option) should be selected in order to generate Content (CAT) files and Price (PRC) files. Click Next on “What Would You Like to Do” screen above. The box below will appear. [Note: *PRC files will not generate if Contract has not been generated from the Archived Solicitation – see pink bar error in screenshot below which will show if you try to generate the Catalog prior to the Contract, otherwise, you’ll just get the file options to select.*] Select a file and click Next.



The generation of a price file from a solicitation award requires a contract to be established first. Please generate a contract for the respective vendor by clicking on the "Generate Contracts" button prior to the generation of the price file.

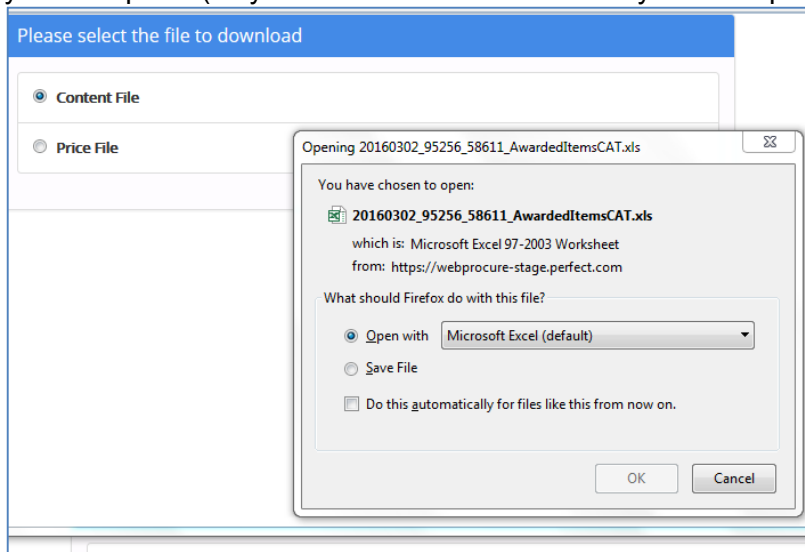
Please select the file to download

☒ Content File

☐ Price File

Close Previous Next

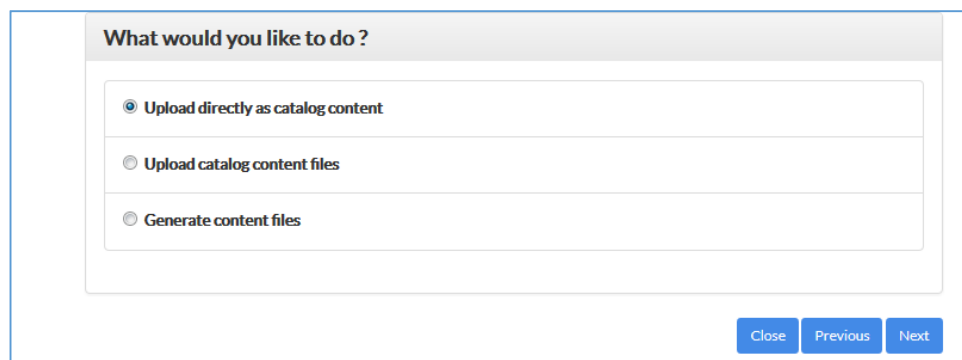
6. Generate the CAT & PRC files and save to your designated save/share location on your computer (so you can access them to modify and re-upload):



7. Complete the missing data fields.
8. There is a checklist of required data fields. Have a unique Supplier Part Number (or unique Supplier Part Number and Part Number extension) matching on the CAT and PRC file This is the link between the CAT and PRC files. It has to be exact.
9. Load prepared CAT and PRC files back to Archived Solicitation either downloaded from Solicitation by following steps above or Received from Supplier in proper format as follows:
10. Access and open Archived Solicitation.

Generate Catalog

11. Select at the bottom of the archived solicitation. The Select Supplier box will appear. Select Next.
12. The “What would you like to do?” box will appear.



13. Select Upload Catalog content files

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14. Locate and select prepared CAT file> Upload
15. Locate and select prepared PRC file> Upload
16. Click Next button
17. The Catalog will be generated or errors will be displayed if data is not complete or correct for loading
18. If Success message is received—Catalog is loaded and available against the Generated Contract
19. Complete steps in **Addendum 1 Catalog Association**.